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GOVERNMENT OF INDIA
MINISTRY OF
COMMERCE & INDUSTRY

PTB. 196 (N)
1000

Report
OF THE
INDIAN TARIFF BOARD
ON THE CONTINUANCE OF PROTECTION TO THE
PICKERS INDUSTRY

BOMBAY

1951

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PERSONNEL OF THE BOARD

Dr. H. I. Dey, D.Sc., (Lond.)	...	<i>President</i>
Dr. B. V. Narayanaswamy Naidu,		
M.A., B.Com., Ph. D., Bar-at-Law...		<i>Member</i>
Mr. B. N. Adarkar, M.A., (Cantab.)	...	<i>Member</i>
Mr. M. A. Mulky, M.Sc. (Econ.) (Lond.)		<i>Secretary</i>

PERSONNEL OF THE PANEL WHICH HEARD THE CASE

Dr. B. V. Narayanaswamy Naidu,		
M.A., B.Com., Ph. D., Bar-at-law	...	<i>Member</i>
Mr. B. N. Adarkar, M.A., (Cantab.)	...	<i>Member</i>

GOVERNMENT OF INDIA
MINISTRY OF COMMERCE & INDUSTRY

New Delhi, the 20th April, 1951.

RESOLUTION
(Tariffs)

No. 26(1)-T.B./51. - The Tariff Board has submitted its Report on the continuance of protection to the Pickers Industry. Its recommendations are as follows:-

- (1) The fair selling prices of indigenous pickers are lower than the landed costs of imported pickers; nevertheless, having regard to the existence of a strong prejudice against the indigenous product, and in order to encourage further investment in the industry, it is recommended that the existing protective duty of 10 per cent. *ad valorem*, which is due to expire on 31st March 1951, should be continued for a further period of two years.
- (2) The small units should be encouraged to re-organise themselves so as to be able to adopt improved processes of manufacture and the State Governments should be requested to give them the necessary assistance for the purpose.
- (3)
 - (i) The manufacturers should make more efficient arrangements for the selection of their raw materials;
 - (ii) The State Governments should be requested to arrange for the proper grading of hides, and
 - (iii) The All-India Picker Manufacturers' Association should take steps to prevent the production of sub-standard pickers by any of its members.

- (4) The lack of uniformity which is the principal defect of all varieties of indigenous pickers can be remedied only by an effective enforcement of standards. Adequate arrangements should be made, in consultation with the industry, to ensure that the standard specifications being formulated by the Indian Standards Institution are strictly adhered to. The All-India Picker Manufacturers' Association stated at the public inquiry that if a Government Inspectorate were established for the proper implementation of the standards, the manufacturers would be prepared to bear a part of the expenditure involved.
- (5) The manufacturers should take note of the defects pointed out by consumers and take concerted steps to remove them.
- (6) The Textile Commissioner has suggested that a list should be prepared of factories which are well equipped and are capable of producing pickers in accordance with the I.S.I. standards and that such factories should be given all facilities to augment their production. This suggestion should be put into effect as early as practicable.
- (7) The Collectors of Customs and the Director-General of Commercial Intelligence and Statistics should be requested to maintain separate statistics by weight and numbers, as well as by value, for import of pickers used in (a) the cotton mill industry, (b) the jute mill industry and (c) other textile industries.
- (8) It should be examined whether, within the existing scheme of import control, an indication could be given to all concerned regarding the import control policy with regard to pickers for at least a year ahead, so as to enable the industry to plan its production.
- (9) The industry may be allowed to import small quantities of Batavian hides which it requires for the manufacture of certain special varieties of pickers.
- (10) The picker manufacturers who have not yet started the manufacture of glue out of waste hide cuttings should take early steps to do so.

2. Government accept recommendation (1) and are taking steps to implement it.

3. Recommendations (3) (ii), and (8) are under examination.

4. The other recommendations are acceptable in principle and steps will be taken to implement them as far as possible wherever necessary.

5. The attention of the industry is invited to recommendations (2), (3), (4), (5), (6) and (10).

S. BHOOOTHALINGAM,

Joint Secretary to the Government of India.

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REPORT ON THE CONTINUANCE OF PROTECTION TO THE PICKERS INDUSTRY

1. The claim of the pickers industry to protection or assistance was first referred to the Tariff Board by the Government of India by the late Department of Commerce Resolution No. 218-T(55)/15 dated 12th October 1946, read with paragraphs 2 and 7 of their Resolution of the same number dated 3rd November 1945 and paragraph 4 of the Resolution dated 16th February 1946. After conducting the necessary inquiries, the Board submitted its Report in 1948 in which it recommended that the existing revenue duty of 10 per cent. *ad valorem* should be converted into an equivalent protective duty and that the duty should remain in force up to 31st March 1951. The recommendations were accepted by Government and the protective duty came into force with effect from 1st April 1949. This protection is due to expire on 31st March 1951 and the present inquiry was undertaken in order to ascertain whether a continuance of the protection beyond that date was necessary. The Board has also taken the opportunity to review the progress made by the industry since protection was granted. Under paragraph 2 of the Government of India, Ministry of Commerce, Resolution No. 30-T(1)/48 dated 6th August 1948, the Board is required "to maintain a continuous watch over the progress of the protected industries by conducting inquiries, as and when necessary, on the effects of the protective duties or other means of assistance granted and advise Government regarding the necessity or otherwise of modifying the protection or assistance granted".

2. (a) On 25th September 1950, the Board issued a Method of press communique-stating that since the protection inquiry. tion granted to the pickers industry was due to expire on 31st March 1951, the question of continuance of protection beyond that date was under investigation. Manufacturers, importers, consumers and others interested in this industry who desired that their views should be considered by the Board were accordingly invited to obtain copies of the relevant questionnaires from the Board's office. A list of those to whom questionnaires were issued and those from whom replies were received is given in Appendix I.

(b) The All-India Picker Manufacturers' Association, Ahmedabad, were requested to furnish the Board with a memorandum describing the steps taken by the industry to implement the recommendations made by the Board in its previous Report. They were also asked to furnish data regarding any new units established since the date of the last inquiry. Various associations interested in the use of this article were invited to express their views with regard to the quality of the indigenous product. At the request of the Board, the Textile Commissioner, Government of India, supplied information regarding the domestic demand for pickers, domestic production, the quality of the indigenous product and various other points arising in connection with the inquiry. Supplementary data regarding the picker manufacturing units in various States were obtained from the Directors of Industries concerned.

(c) On 8th July 1950, Dr. B.V. Narayanaswamy Naidu, Member, visited the factory of Pickers Ltd., Ahmedabad. On 9th January 1951, Mr. B.N. Adarkar, Member, visited the factory of National Leather Industries, Ltd., Daravi, Bombay. Mr. N. Krishnan, Cost Accounts Officer attached to the Board, visited the factory of National Leather Industries Ltd. on 8th December 1950. Factories of Pickers

Ltd., Hides and Leather Products, Chandabhai Brothers and Swastik Industries were also visited by Mr. Krishnan during his stay at Ahmedabad on 27th, 28th and 29th December 1950.

(d) A public inquiry was held at the Board's office in Bombay on 15th January 1951. A list of those who attended the inquiry and gave evidence is given in Appendix II.

3. (a) A brief account of the history of this industry has been given in paragraph 5 of the Board's earlier Report. At the time of the last inquiry, the number of units engaged in the manufacture of pickers was about 60 with a total rated capacity of 50,000 gross per annum. The number of units has now increased to 70, but many of the units are small and reliable information about their rated capacity is not available. Several of these units work on a cottage industry basis and their individual production is small and irregular. There are a number of such small units at various centres in the Bombay State and at Thanghad in Saurashtra. Among the larger units, those engaged in the manufacture of cotton pickers, in addition to other varieties of pickers, are in regular production and have made appreciable additions to their productive capacity. Of the 16 large units for which information is available, 13 units produce cotton, jute and other pickers and the aggregate rated capacity of 10 of these units for which information is available now comes to 38,780 gross per annum on a single shift. Most of these units are located in or around Ahmedabad. The 3 units producing jute pickers only have an aggregate rated capacity of about 2,000 gross per annum on a single shift. Two of these units, namely, S.K. Guha & Co. and the National Chamois Works are located in Calcutta and the third Mr. M.N. Mashruwala, is in Ahmedabad. Owing to the lack of demand for indigenous jute pickers, all these units have suspended production. It is understood that nine or ten other units in Calcutta were also producing

jute pickers, in addition to other product of hides and leather, but that these also have stopped production of jute pickers for the same reason. The same is the case with the units which were producing jute pickers along with cotton pickers. It was stated at the public inquiry that one Calcutta factory alone has on hand an unsold stock of Rs. 70,000 to Rs. 80,000 worth of jute pickers and that the stocks of jute pickers with the leading manufacturers in Ahmedabad are valued at approximately Rs. 1,50,000. The jute pickers section of the industry, therefore, has become virtually extinct as a result of the complete absence of demand from Indian jute mills for indigenous pickers. The aggregate rated capacity of the 13 units, for which information is available for the manufacture of pickers of all sorts is about 40,780 gross per annum. At the public inquiry, the manufacturers stated that their capacity could be utilised with slight adaptation, for the production of any variety of pickers, according to the state of demand.

(b) Since the grant of protection in 1948, some of the leading manufacturers of pickers have taken steps to modernise their equipment. Pickers Ltd., Chandabhai Brothers and the National Leather Industries have installed modern power plants and the first of these has engaged an English technician with a view to improving the process of manufacture. The Hides and Leather Products have also imported a similar plant and it is in the process of installation. Messrs. Jayhind Leather Industries Ltd., had purchased a complete picker manufacturing plant in England in 1947, but it came into production after the last inquiry. The total capacity of the five units equipped with power presses comes to 22,800 gross per annum on a single shift. We understand that a new unit equipped with modern power-driven machinery will shortly come into production at Kanpur. There are, however, no power presses in Calcutta. From the evidence received by us, it is clear that considerable new investment has taken place

in the industry and that the leading manufacturers are fully conscious of the importance of improving their plant and processes of manufacture. The manufacturers have stated that they have so far had no difficulties in securing their requirements of plant and machinery from abroad.

(c) In paragraph 23 of its earlier Report, the Board had recommended that the various small units which manufactured pickers on a cottage industry scale should be properly organised and that the State Governments concerned should provide them with financial and technical aid and other facilities needed for the purpose. This recommendation was brought to the notice of the State Governments, but we understand that so far little progress has been made in this direction. Out of the 16 State Governments from whom replies were received, 13 had nothing to report. The Uttar Pradesh has at present no appreciable production of pickers. The State Governments of Bombay and West Bengal have stated that most of the picker manufacturers in their States do not need financial assistance and that their difficulties are due to other factors, such as the lack of demand for their products, in the case of West Bengal and the difficulty in securing certain materials, in the case of Bombay. The pickers produced by these small, ill-equipped units are far below the requisite standard and the sale of such pickers gives a bad name to the industry as a whole. We consider it essential for the sound development of this industry that such small units should be encouraged to reorganise themselves, so as to be able to adopt improved processes of manufacture, and that the State Governments should be requested to give them the necessary assistance for the purpose, so that the pickers manufactured by them also may conform as nearly as possible to the standards laid down by the Indian Standards Institution.

4. At the last inquiry, the domestic demand for Domestic pickers during the three years to 1950 was estimated at 35,000 gross per annum. Of this, the requirements of the cotton textile industry were estimated at 30,000 gross and those of the jute mill industry at 4,250 gross. The balance of 750 gross represented the demand from the silk and woollen industries. Information is now available regarding the actual consumption of pickers in 230 cotton mills, with a total loomage of 142,356 looms, during 1949. According to the returns received by the Textile Commissioner, these mills consumed 15,640 gross of imported pickers and 7,552 gross of indigenous pickers in that year. The total installed loomage of the cotton textile industry is 222,242 looms. Computing on this basis, the total demand for cotton pickers is estimated at about 37,750 gross per annum. This estimate was discussed at the public inquiry and was generally endorsed. As regards jute pickers, the Indian Jute Mills Association has estimated the requirements of the jute mill industry at 3,500 gross per annum. The reduction as compared with the last estimate is due to the fact that the industry is now working only 42½ hours a week and has sealed 12½ per cent. of its hessian looms. It was agreed at the public inquiry that the previous estimate of the demand from the silk and woollen industries did not call for any revision. The total domestic demand for pickers, thus, comes to 42,000 gross made up as follows:-

Cotton pickers .	37,750 gross
Jute pickers ...	3,500 ,,
Others ...	750 ,,
	<u>42,000 gross</u>

5. The following table shows the total production of Domestic pickers of various kinds in the 16 units for production. which figures have been received by us. Figures for individual units are given in Appendix III.

	4-B round foot	Drop box	Jute	Unspecified	Total
1948	13,269	198	487	2,678	16,632
1949	88,292	122	100	2,855	11,369
1950	7,276	48	--	3,025	10,349

At the last inquiry, figures of production were received from 21 units and the total production of pickers in those units was as follows:

	4-B round foot	Drop box	Jute	Other kinds	Total
1945	18,813	86	--	301	19,970
1946	10,239	222	314	45	17,857
1947	8,160	148	1,722	24	13,269

The two sets of figures are not comparable, but judging from the figures relating to individual units, it appears that production has declined considerably during the last two years. In the case of some units, the decline in production was due to special factors, such as the interruption caused by the installation of new machinery, as in the case of Pickers Ltd. and the National Leather Industries or the delays in securing imports of sperm oil, as in the case of the Jayhind Leather Industries. As stated earlier, most of the factories were forced to stop the production of jute pickers in 1948, and have not been able to resume it, owing to their inability to sell their output to the jute mills in Calcutta. The bulk of the production now consists of cotton pickers, particularly of the 4-B round foot variety.

6. (a) The principal raw materials required for the ~~Raw~~ manufacture of pickers are (1) raw buffalo hides, ~~materials.~~ (2) sperm oil, (3) sodium sulphide, (4) wires and wire nails, (5) panel pins, (6) lime, (7) sulphuric acid and (8) caustic soda.

(b) Before partition and for about a year thereafter good quality hides were available from Peshawar. After

devaluation, however, there has been virtually no trade in hides with Pakistan and the Indian industry is, therefore, now dependent principally on Bareilly in the U.P. for its requirements of raw hides. Prices of buffalo hides have risen considerably of late and since the cost of hides constitutes more than 67 per cent. of the total cost of production of pickers, the latter has consequently increased. In the memoranda received from some of the importing firms, it was stated that pickers of really good quality could be made only from selected Batavian hides and that hides of comparable quality were not available in India. Mr. S. Raja, Superintendent, Government Tanning Institute, Bombay, on the other hand, stated that the requirements of the indigenous pickers industry amounted to only 1 lakh pieces a year, whereas the total production of buffalo hides in the country was about 57 lakh pieces, and that the industry should consequently have no difficulty in securing its requirements locally for the manufacture of any variety of pickers, except perhaps drop box pickers and a few other special varieties for which very thick hides were required. Mr. Raja also informed the Board that most of the hide merchants had lately been selling only wet salted hides and that the quality of hides coming into the market had also improved. The question was discussed at the public inquiry at which most of the manufacturers agreed that given proper care in the selection of hides, the factories should be able to secure their requirements of hides internally without any difficulty. It was disclosed during the public inquiry that owing to the existence of a strong prejudice against indigenous pickers and the consequent necessity to offer them at as low a price as possible as compared with imported pickers, some of the manufacturers were probably using inferior hides in order to keep down their cost of production. We strongly deprecate this tendency and recommend that the All-India Picker Manufacturers' Association should take steps to prevent the production of sub-standard

pickers by any of its members. Since the quality of pickers depends mainly on the quality of hides used, the manufacturers should make more efficient arrangements for the selection of their raw material. We recommend further that the State Governments concerned should be requested to arrange for the proper grading of hides.

(c) The industry has had no serious difficulty in securing its requirements of other materials, except sperm oil with respect to which some manufacturers had complained of delays, in the issue of import licences. We trust, however, that with the recent improvements in the administrative procedure for the issue of import licences, such delays will be greatly minimised in future. Latterly, the supply position of sodium sulphide also is threatening to be difficult, but we understand that the All-India Pickers Manufacturers' Association is preparing a scheme for purchasing the entire requirements of its members through a common channel and that the scheme will be put into effect if prices of this material continue to rise.

7. (a). The quality of a picker is judged primarily by its durability and by the ease with which it moves on the loom. The durability of a indigenous product. picker is affected partly by the type and age of the loom, the speed at which it works and the type of the shuttle used. The question of quality was discussed at considerable length at the last inquiry and a number of those present contended that the indigenous pickers had a shorter life than the imported ones, and that uniform standards were not being maintained by the indigenous manufacturers. We are happy to note that since the grant of protection, the quality of the indigenous pickers has shown a marked improvement and that this has been confirmed by the evidence received from Government Departments and several textile mills as well as from the manufacturers

themselves. So far as cotton pickers are concerned, the Textile Commissioner has testified to the improvement in the quality of the indigenous pickers and has stated that they now compare favourably with the imported pickers. The Tata Industries, Ltd. have informed the Board that the quality of pickers produced by Pickers Ltd., which are used in their mills, is a close match to the imported article. They have added that although no statistical trials have been taken in their mills, some idea of the improvement in the quality of the indigenous pickers could be obtained from the fact that the consumption of pickers in their mills per 1000 hours during the year 1949 was lower than that in the previous years. The Juggilal Kamla-pat Cotton Spinning and Weaving Mills Co. Ltd., Kanpur, which have been using exclusively the indigenous pickers, have expressed the view that the pickers manufactured by Messrs. Chandabhai Brothers are of good standard quality. The Textile Mills in Madhya Pradesh also use the indigenous pickers only. The Madhya Pradesh Mill-owners' Association, Nagpur, have also referred to the "noticeable improvement" in the quality of Indian pickers which has taken place recently. The Muir Mills Co. Ltd., Kanpur, have expressed a similar opinion. Similarly, the Cawnpore Textiles Ltd., Kanpur, have described the quality of the indigenous pickers used by them to be "quite satisfactory". Many of these users, however, have pointed out that although the particular types of indigenous pickers used by them have given satisfactory service, the improvement is by no means general and that the pickers produced by a number of indigenous manufacturers are still vastly inferior to the imported ones. Moreover, it has been the common experience of the majority of consumers that indigenous manufacturers fail to maintain a uniform standard of quality. In most cases, while the samples and the first few lots received from the manufacturers are satisfactory subsequent deliveries show a marked deterioration in quality. The Mill-owners' Association, Bombay, have drawn attention to the following defects of the indigenous pickers:

(1) The life of the indigenous pickers is much shorter than that of the imported ones;

(ii) Unlike the imported pickers, the indigenous pickers do not stand wear and tear, since they are not properly seasoned, with the result that they bend or break at the shoulder;

(iii) The picker hide, being too soft, permits the shuttle to bore holes through it in a very short time. Nails driven in the leather often display poor workmanship and consequently the shuttle boxes are rendered rough and this often results in the cutting of the weft;

(iv) The curing of hides has not yet reached the standard of uniformity which is essential to the maintenance of the quality of pickers.

The Ahmedabad Millowners' Association have also pointed out similar defects, although they also have stated that some improvement in quality has taken place since the grant of protection. It was stated in the public inquiry that the average life of the indigenous cotton pickers is about 400 to 500 hours while that of the imported ones is 500 to 600 hours.

(b) As regards jute pickers, the Indian Jute Mills Association, Calcutta, have informed the Board that there has been improvement in the quality of pickers produced by some of the Indian manufacturers, but that the improvement is not general and in any case does not approach "what it should have been if the Board's recommendations had been put into effect". The Association has stated that the actual performance of the indigenous pickers have varied between a few minutes to several hundred hours. The Director of Industries, West Bengal, has also pointed out that the indigenous jute pickers are not well rivetted and are not seasoned in sperm oil for a sufficiently long time. On the other hand, Mr. Mukund N. Mashruwala, Ahmedabad, one of the manufacturers of jute pickers maintained that the tests carried out with his brand, namely, "Duro",

by Mr. Cole of the Bird Group of Jute Mills, Calcutta, have shown it to have the maximum durability of 1245 working hours. Similarly, the National Chamois Works, Calcutta, have stated that their product also was tested by Messrs. Bird & Co. and was found to be in no way inferior to the imported product. At the public inquiry, Mr. Cole confirmed having tested the products of the two manufacturers and explained that, while the first sample of 288 pickers gave an average of 785 hours, the average for a subsequent lot of 1200 pickers came to only 150 hours. The shorter life of the indigenous jute pickers is mainly attributed to the fact that in many cases they are not steeped in oil for a sufficiently long time. At the public inquiry, one of the manufacturers expressed his personal opinion that steeping was not strictly essential. The weight of the expert opinion is, however, in favour of steeping and the manufacturer concerned assured the Board that, despite his personal belief, he would make adequate arrangements for the steeping of his pickers in future in order to conform to the standard laid down by the Indian Standards Institution. Judging from the discussions at the public inquiry, we are satisfied that, while the Indian Industry has attained the technical efficiency required for manufacturing jute pickers of satisfactory quality, most of the manufacturers are not yet able to maintain a uniform standard of quality.

(c) The lack of uniformity, which is the principal defect of all varieties of indigenous pickers, can be dealt with only by an effective enforcement of standards. We understand that the Indian Standards Institution has finalised its standard specifications for pickers and that the latter are going to be introduced shortly. We recommend that adequate arrangements should be made, in consultation with the industry, to ensure that the standard specifications are strictly adhered to. The All-India Picker Manufacturers' Association stated at the public inquiry that

if a Government Inspectorate were established for the proper implementation of the standards the manufacturers would be prepared to bear a part of the expenditure involved. We recommend further that the manufacturers should take note of the defects pointed out by consumers and take concerted steps to remove them. In this connection, the Textile Commissioner has suggested that in order to bring about an improvement in the quality of the indigenous pickers, a list should be prepared of factories which are well equipped and are capable of producing pickers in accordance with the I.S.I. standards and that such factories should be given all facilities to augment their production. This suggestion was warmly supported by the representatives of the Association at the public inquiry. We feel that a classification of factories on the lines suggested by the Textile Commissioner would provide an effective means of securing an improvement in quality and would also safeguard the interests of the consumer and we, therefore, recommend that the suggestion be put into effect as early as practicable.

8(a) According to the sea-borne trade returns, imports of pickers into India declined from 5,318 cwts. Imports. in 1947-48 to 2,518 cwts. in 1948-49, 1,843 cwts. in 1949-50 and 813 cwts. in the first 6 months of 1950-51. In the sea-borne trade accounts, imports of pickers are recorded only by weight and not by numbers and no distinction is made between different varieties of pickers. However, on the basis of an assumed ratio of 40 lbs. \approx 1 gross, it may be estimated that about 14,890 gross were imported in 1947-48, 7,050 gross in 1948-49, 5,160 gross in 1949-50 and 2,276 gross during the first 6 months of 1950-51.

(b) In order to obtain some idea about imports under individual categories of pickers, the Collectors of Customs, Calcutta, Bombay and Madras were approached for figures relating to their ports and the information received from them is given below:

Port of importa- tion	Coun- try of origin	1948-49		1949-50		1950	
		Qty. in gross	Value in Rs.	Qty. in gross	Value in Rs.	Qty. in gross	Value in Rs.
Bombay	—	2,441	11,44,412	1,812	8,80,392	804*	3,79,953*
Madras	U.K.	154£	27,587£	1,484£	30,306£	42@	8,762@

JUTE PICKERS

COTTON PICKERS							
Calcutta	U.K.	—	—	281£	1,37,083£	796@	1,91,225@
	Japan	--	—	--	—	14@	7,136@

*Figures are for April-June 1950.

£ " " " the respective Calendar years.

@ " " " January-November 1950.

(c) The Buffalo Picker Manufacturers' Association in the U.K. have also furnished us with statistics of pickers exported from the United Kingdom to India during 1948, 1949 and 1950 and these are as follows:

	1948	1949	1950
	Gross	Gross	Gross
Cotton.....	2584½	1790	1144½
Wool	44	90½	18
Jute	3039	2499	269½
	5667½	4379½	1432 approx.

(d) We recommend that the Collectors of Customs and the Director-General of Commercial Intelligence and Statistics be requested to maintain separate statistics, by weight and numbers as well as by value, for imports of pickers used in (a) the cotton mill industry, (b) the jute mill industry and (c) other textile industries.

9.(a) *Dollar and other hard currency areas:* No licences import have been issued for imports of pickers from dollar control. and other hard currency areas (except Switzerland) since July 1948. The classification of currencies as hard or soft has, however, undergone many changes during the period under review. The import policy for Sweden was

separately indicated during the period, July-December 1948, and imports of pickers from that source during that period were allowed subject to a monetary ceiling. Switzerland was also a hard currency country and while pickers were allowed to be imported from that source subject to a monetary ceiling during July-December 1948, no imports were allowed subsequently. During the current licensing period, January-June 1951, no imports of pickers are to be allowed under General Licences or licences for Japan.

(b) *Sterling and soft currency areas*: Imports of pickers were allowed subject to a monetary ceiling from the sterling and other soft currency areas during July-December 1948 and January-June 1949. During July-December 1949 and January-June 1950, no licences were granted for imports of jute pickers from soft currency sources, but pickers required by other industries from such sources were licensed subject to a monetary ceiling. During July-December 1950, while imports of jute pickers were not licensed, licences for pickers required for other textile industries were issued to established importers to the extent of 1/3 of their basic imports and to actual users and new comers on an *ad hoc* basis. During the current licensing period January-June 1951, while no imports of jute pickers are to be allowed, imports of other varieties of pickers will be allowed to established importers to the extent of 1/3 of their basic imports and to actual users on an *ad hoc* basis. No licences will be issued to new comers.

10. Under item 72(33) of the first schedule to the Existing Indian Customs Tariff (33rd issue), pickers rate of used in the textile industry are subject to import duty. a protective duty of 10 per cent. *ad valorem*.

The relevant extract from this schedule is given below:-

Item No.	Name of article	Nature of duty	Standard rate of duty	Preferential rate of duty if the article is the produce or manufacture of			Duration of protective rate of duty
				The U.K.	A British colony	Burma	
72(33)	Pickers used in Textile Industries	Protective	10% <i>ad valorem</i>	—	Free	Free	March 31st, 1951

11. (a) At the last inquiry, the cost data relating Estimate of to Pickers Ltd., Ahmedabad, was taken as the cost of basis for estimating the cost of production production and fair in the industry as a whole, since this unit selling price. had a larger production and a higher general efficiency. Pickers Ltd. still remains one of the most efficient and progressive units in the industry. The Cost Accounts Officer attached to the Board, accordingly, examined the cost data relating to this unit, together with those relating to Hides and Leather Products Ltd., Ahmedabad, and the National Leather Industries, Bombay.

(b) Pickers Ltd. is a public limited company with a paid-up capital of Rs. 8.6 lakhs. It has a capacity of 9,000 gross on a single shift and produced 428 gross of 4-B round foot pickers during January-June 1950 and 1,763 gross of 4-B round foot pickers and 40 gross of drop box pickers during July-November, 1950. The firm is not at present manufacturing jute pickers, but is completing some of the semi-processed jute pickers already in stock. Its production was low during the first half of 1950, since its new power plant was then in the process of installation. The firm has added substantially to its capital assets which now stand at Rs. 5.15 lakhs as compared with Rs. 2.85 lakhs at the time of the last inquiry. It has also engaged a foreign technician. During 1951-52, the firm expects to produce 6,000 gross of 4-B pickers, 100 gross of drop box pickers and 1,000 gross of jute pickers. Given favourable conditions, the firm expects to increase its output of 4-B pickers during 1952-53 and 1953-54 to 7,000 gross and 8,000 gross respectively, and that of jute pickers to 1,500 gross and 2,000 gross respectively. Since its production during 1950 was below normal and its cost data for 1949 are not representative owing to changed conditions, the Cost Accounts Officer had to estimate the cost of production in this firm in consultation with its representatives.

(c) The Hides & Leather Products Ltd. is a private limited company with a subscribed capital of Rs. 2 lakhs. The firm manufactures only 4-B round foot pickers, in addition to a small quantity of buffers. Its production is seasonal and is discontinued during the monsoon months. Most of the work is at present done by employing contract labour, but the firm has recently imported a Hydraulic Power Press for the manufacture of 4-B round foot pickers and intends to import another press for the manufacture of jute pickers by the end of 1951. We understand that the firm proposes to place orders for some further equipment such as a rivetting machine, a drilling machine, a slotting machine, etc., in order to complete its plant. The firm is constructing a factory at Palanpur, about 90 miles from Ahmedabad, and expects to shift its works from Ahmedabad to Palanpur within a few months. It is also arranging to secure the services of a foreign technician for a period of six to eight months from October 1951. When its new factory is ready to go into production, the present system of contract labour will be abolished. Its productive capacity, which is at present 4,000 gross of 4-B pickers and 600 gross of other pickers, is expected to increase to 6,000 gross of 4-B pickers and 1,200 gross of jute pickers when the whole of the additional equipment has been installed. The firm produced only 1,375 gross of 4-B pickers during January-September 1950, but given favourable conditions, it expects to be able to produce upto its capacity on a single shift during the next three years. In view of the expected changes in its equipment and methods of manufacture, its future costs cannot be worked out on the basis of its past actuals and have, therefore, been estimated in consultation with its representatives. Due allowance has been made for the additional expenditure involved in effecting the various improvements contemplated by the firm.

(d) The National Leather Industries is a proprietary concern producing 4-B round foot pickers only on a seasonal

basis. It is equipped with a power press with a capacity of 1,200 gross per annum on a single shift. Its actual production was 1,000 gross during 1948-49 and 700 gross during 1949-50. Production was irregular during 1949-50, owing to frequent break-downs of the press. The firm expects to produce 2,000 gross in 1951-52, 2,500 gross in 1952-53 and 3,000 gross in 1953-54. The firm does not maintain a proper system of accounts and its cost of production has, therefore, been estimated in consultation with its representatives.

(e) In the case of Pickers Ltd., the cost of production has been estimated separately for 4-B pickers and jute pickers and in the case of the other two firms, for 4-B pickers only. The estimates relating to Pickers Ltd. were discussed in camera with their representatives. A detailed report on the cost of production in these three units is being submitted separately as a confidential enclosure to this Report, but a summary of the Board's estimate of the cost of production (including profit) of pickers in the three units during 1951-52, is given in the following tables:-

[Tables on pp. 19 & 20]

TABLE I

Board's estimate of the cost of production of 4-B
round foot pickers (per gross) during 1951-52.

Name of the firm	PICKERS LTD.	Hides and Leather Products Ltd.	National Leather Industries
Estimated production	6200 gross	2400 gross	2000 gross
	Batavian Hides	I n d i a n H i d e s	
	Rs.	Rs.	Rs.
1. Materials:			
(a) Hides	132.50	104.00	96.00
(b) Panel pin & wire.	1.48	1.48	1.49
(c) Oils	1.95	1.95	2.15
(d) Other raw mate- rials (Lime, Caustic soda, Sulphuric acid, Sodium Sulphate, etc.)	2.00	2.00	2.00
Total Materials	137.93	109.43	101.64
2. Power and Fuel	1.00	1.00	1.00
3. Labour	16.00	16.00	15.00
4. Repairs and Main- tenance	3.50	3.50	3.00
5. Consumable Stores	5.85	5.85	4.17
6. Establishment	3.99	3.99	2.79
7. Depreciation	7.19	7.19	5.28
8. Other overheads	1.00	1.00	1.00
9. Packing charges	—	—	—
10. Selling expenses	3.48	2.91	2.63
11. Interest at 4% on working capital.	179.94	150.87	136.51
12. Total of 1 to 11	2.44	2.44	2.50
13. Less credit for hide cuttings.	177.50	148.43	134.01
14. Net Total	6.28	6.28	3.32
15. Return on Block at 10%.	183.78	154.71	137.33
16. Total cost (in- cluding profit).			134.76

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TABLE II

Board's estimate of the cost of production of jute pickers
(per gross) during 1951-52

Name of the firm	Pickers Ltd.	
	1000 gross	
Estimated production	Batavian Hides	Indian Hides
	Rs.	Rs.
1. Materials:		
(a) Hides	300.00	234.00
(b) Rivets and wire nails.	13.44	13.44
(c) Sperm oil	3.90	3.90
(d) Wooden pegs	4.00	4.00
(e) Other raw materials (Caustic soda, Sulphide, Sulphuric acid, etc.)	4.00	4.00
Total materials	325.34	259.34
2. Power and Fuel	2.00	2.00
3. Labour	32.00	32.00
4. Repairs and Maintenance	7.00	7.00
5. Consumable Stores		
6. Establishment	11.70	11.70
7. Depreciation	7.98	7.98
8. Other overheads	14.38	14.38
9. Packing charges	2.00	2.00
10. Selling expenses	--	--
11. Interest on working capital	7.93	6.61
12. Total of 1 to 11	410.33	313.01
13. Less credit for hide cuttings.	5.69	5.69
14. Net Total	404.64	337.32
15. Return on Block at 10%	12.56	12.56
16. Total cost (including profit).	417.20	349.88

(f) It will be seen that in the case of Pickers Ltd., separate estimates have been made for pickers made of Indian hides and those made of Batavian hides. As stated earlier, the evidence produced before us does not indicate that hides of the proper quality required for the manufacture of pickers are not available in India. Batavian hides are being used by some of the manufacturers only to supplement indigenous hides, and in the case of Pickers Ltd., which

has been using Batavian hides to a greater extent than other manufacturers, such hides do not account for more than one third of its total consumption. In the circumstances, we propose to take the cost of production of pickers made of Indian hides only, for the purpose of determining the fair selling price of pickers.

(g) In the above estimates, working capital has been taken as equal to six months' cost of production and interest has been allowed thereon at 4 per cent. We have also allowed a return on the gross block at 10 per cent.

(h) It will be observed that the cost of production per gross of 4-B pickers made of Indian hides is Rs. 155 in Pickers Ltd., Rs. 137 in Hides and Leather Products Ltd., and Rs. 135 in the National Leather Industries. The high cost of production in Pickers Ltd., is explained by its higher cost of raw hides, establishment and other overheads as well as by the higher return on block due to it on account of its larger investment. We think that these higher charges are fully justified by the results and that if the other units in the industry were also to attain a higher standard of efficiency, their cost of production also would rise to a comparable level to that of Pickers Ltd. We have, therefore, come to the conclusion that the cost of production in Pickers Ltd. should be taken as representative of the future cost of production in the industry as a whole. On this basis, we estimate the fair selling price of 4-B pickers for 1951-52 at Rs. 155 per gross and that of jute pickers at Rs. 350 per gross. In the Board's earlier Report, the fair selling price of 4-B pickers for 1947-48 was estimated at Rs. 148-1-11 per gross including an allowance of 20 per cent. for prejudice. The increase is due partly to the rise in the cost of raw hides, which constitutes over 57 per cent. of the fair selling price, and partly to the general improvement in the quality of the indigenous pickers.

12. We have received c.i.f. prices of different varieties of pickers from several importing firms as well as from the Collectors of Customs, Bombay, Calcutta and Madras (Vide Appendix IV). As stated earlier, imports of pickers into India during 1950 were drastically reduced and consequently, figures of c.i.f. price are not available for a later month than October 1950 for 4-B pickers and June 1950 for jute pickers. The United Kingdom is the principal source of supply. It was agreed during the inquiry that the c.i.f. price of Rs. 192-8-6 per gross which was paid for shipments received from the U.K. in June 1950, should be taken for purposes of comparison with the fair selling price of the indigenous product. This roughly tallied with the figure furnished at the public inquiry by the representative of Messrs. Robert McLean & Co. Ltd., who are one of the leading importers of pickers from the United Kingdom. Some consignments of pickers were received from the Netherlands at Rs. 179-3-9 per gross in August 1950 and from Japan at Rs. 173-7-2 per gross in October 1950. Imports from these countries have, however, had no effect on market prices of imported pickers which, even according to the figures supplied by the manufacturers, were quoted at Rs. 220 or more during 1950. We have, accordingly, adopted the quotation of Rs. 192-8-6 as the c.i.f. price of 4-B pickers. As regards jute pickers, the latest c.i.f. price as furnished by Messrs. McGregor and Balfour, Calcutta, and relating to a consignment received in June 1950, is Rs. 431-2-0 per gross and we have adopted it, as this also is in accord with the data regarding market prices of imported pickers received from the manufacturers. At the public inquiry, the representatives of Messrs. Robert McLean & Co. Ltd., and Messrs. Gannon Dunkerley & Co. Ltd., informed the Board that their principals in the United Kingdom had decided to raise the prices of pickers by nearly 50 per cent. We have, however, not taken this increase into account, because firstly, no shipments have yet taken place

at the higher prices cited by these firms and secondly, in so far as the increase in the prices of foreign pickers is due to the upward trend of raw hide prices, the cost of production of indigenous pickers also will be affected by the same factor sooner or later. The landed costs of 4-B and jute-pickers, on the basis of the c.i.f. prices adopted by us, work out as follows:-

<u>Per gross</u>	<u>4-B</u> Rs.	<u>Jute</u> Rs.
C.i.f. ...	192 8 6	431 2 0
Customs duty @ 10%	19 4 0	43 1 10
Clearing charges @ 1%	1 14 10	4 5 0
Landed cost with duty	213 11 4	478 8 10
Landed cost without duty	194 7 4	435 7 0

13. In their memorandum to the Board, the All-India Picker Manufacturers' Association have asked for an increase in the protective duty on pickers from the existing level of 10 per cent. to 60 per cent. *ad valorem*. It will, however, be seen from paragraphs 11 and 12 above, that while the fair selling prices of indigenous 4-B and jute pickers as estimated by us are Rs. 155 and Rs. 350 per gross respectively, the landed costs, ex-duty, of the corresponding types of imported pickers are Rs. 194-7-4 and Rs. 435-7-0 respectively. The landed cost, ex-duty, thus exceeds the fair selling price by Rs. 39-7-4, or by over 25 per cent. of the fair selling price in the case of 4-B pickers, and by Rs. 85-7-0, or by over 24 per cent. of the fair selling price in the case of jute pickers. The existing protective duty on pickers is 10 per cent. *ad valorem* and the margin between the fair selling prices and landed costs would be wider, if the duty were taken into account. *Prima facie*, it would appear that this industry does not need protection by means of customs duty. Account must, however, be taken of several other factors which have a bearing on this question.

In the Board's previous Report, an allowance at the rate of 20 per cent of the fair selling price was made for consumers' prejudice in deciding the quantum of protection needed by this industry. The evidence produced before us during the present inquiry leaves no doubt that there is still considerable prejudice against the indigenous pickers, and that in the case of jute pickers, consumers have shown such strong aversion to the indigenous product, even after the grant of protection, that the manufacturers have been forced to stop production altogether. According to the evidence received from the jute mills themselves, the quality of indigenous pickers has improved and the tests carried out by some of the jute mills have shown that the products of at least a few of the indigenous manufacturers are equal in quality to imported pickers. Granting that the manufacturers fail to maintain a uniform standard, this by itself would not justify a complete non-use of the indigenous product, because, pending the institution of proper arrangements for enforcement of standards, it is possible for the consuming industries to make their purchases and payments subject to suitable guarantees about the actual performance of the product. This, however, presupposes a certain amount of good-will on the part of the consuming industries towards an ancillary industry, and we regret to say that this has not been forthcoming in the requisite measure from at least some of the consuming industries concerned, and particularly from the jute mill industry. The prejudice against the indigenous product has persisted inspite of the fact that there is an appreciable margin between the prices of indigenous and imported pickers, and it is very probable that the prejudice would have a greater scope to operate, and the demand for the indigenous product would decline further, if the existing margin between the prices of indigenous and imported pickers were reduced through a reduction or abolition of the duty. Moreover, the industry has enjoyed protection only for a

period of 2 years and the grant of protection has encouraged the industry to modernise its equipment and processes of manufacture and thereby improve the quality of its product. Withdrawal of protection at this stage may produce adverse psychological repercussions and thus discourage further investment in the industry. This will be most undesirable, since there is still considerable scope for developing this industry, and being an industry which supplies one of the vital accessories of textile manufacture, its continued development is necessary in the national interest. During the war, when imported pickers were not available, the textile industry in this country would have been seriously handicapped, if an indigenous picker industry were not in existence. Further, the existing protective duty is already low, being only 10 per cent. *ad valorem*. A revenue duty at this rate was in force for many years before it was converted into a protective duty, and its incidence on the cost of production of textiles is also small. We believe that the present budgetary position would in any case not permit a reduction or abolition of this duty, while its conversion from a protective to a revenue duty would be of no practical benefit to the consumer. We understand that one of the manufacturers, namely, Pickers Ltd., has recently exported a small quantity of pickers to a foreign country, but after examining the details of this transaction, we are satisfied that it does not by itself vitiate the case for the continuance of the protective duty. For these reasons, although the fair selling prices of indigenous pickers are lower than the landed costs of imported pickers, we have come to the conclusion that having regard to the existence of a strong prejudice against the indigenous product and the desirability of avoiding any step which may discourage further investment in the industry, the existing protective duty of 10 per cent. *ad valorem*, which is due to expire on 31st March 1951, should be continued for a further period of 2 years.

14. (a) *Import control*: The industry has asked for Supplementary recommendations. a complete ban on imports of foreign pickers, on the grounds that the domestic capacity is sufficient to meet the full requirements of the country and that the ban would help the industry to overcome the prejudice on the part of consumers. As stated in paragraph 4 above, the demand for pickers is estimated at 42,000 gross per annum. As against this, the rated capacity of the 13 units for which figures are available is about 40,780 gross per annum on a single shift only. Even if we were to take into account the aggregate rated capacity of only those units which are, or are shortly going to be equipped with power-driven picker presses, it amounts to 22,800 gross on a single shift and this by itself, if worked for three shifts, would suffice to meet almost the whole of the domestic requirements. Moreover, the industry has considerable potentialities for expansion and should be able to meet additional demands without difficulty. Imports of pickers are already subject to control and according to the figures furnished by the Chief Controller of Imports, licences for jute and cotton pickers were issued to the extent of only 311 gross and 2,559 gross respectively from January to June 1947 as against 3,006 gross and 7,242 gross respectively from January to June 1948. The manufacturers, however, have maintained that so far as jute pickers are concerned, this restriction of imports has had no effect on the demand from jute mills, since both the mills and the trade are carrying stocks of imported pickers which will suffice to meet the demand for over two years. The Board has no information about the stocks of imported jute pickers with the trade, but the data furnished by the Indian Jute Mills Association in their letter dated 10th January 1951 about the stock position of jute mills are as follows:-

*Statement showing the position of Indian Jute Mills
in regard to stocks of imported pickers as at 7-12-1950*

(the percentage is of the total loomage of the industry)

<u>Less than 1 month</u>	<u>1 to 2 months</u>	<u>2 to 3 months</u>	<u>3 to 4 months</u>	<u>4 to 5 months</u>	<u>5 to 6 months</u>	<u>6 to 7 months</u>
.73%	3.57%	2.73%	11.86%	1.88%	2.40%	1.19%
<u>7 to 8 months</u>	<u>8 to 9 months</u>	<u>9 to 10 months</u>	<u>10 to 12 months</u>	<u>13 to 18 months</u>	<u>19 to 24 months</u>	
5.57%	5.00%	4.57%	4.69%	4.7%	9.33%	
<u>2 to 3 years</u>	<u>3 to 4 years</u>	<u>4 to 5 years</u>				
22.90%	7.53%	2.59%				
Total				...	92.24%	
Mills with no stock of imported pickers					7.76%	
				Total	100.00%	

Stocks of imported pickers in numbers = 4737½ Gross.

The above figures relate to all the jute mills in India and not merely to those which are members of the Indian Jute Mills Association. It will be seen that on 7th December 1950, certain mills comprising 33 per cent. of the total loomage were carrying stocks which would suffice for over 2 years, others having 36 per cent. of the loomage from 6 months to 2 years and still others with 23 per cent. of the loomage for less than six months. Mills with 8 per cent. of the loomage had no stocks of imported pickers. The total stocks amounted to 4,737 gross which were equal to about 16½ months' requirements of the entire jute mill industry. The representative of the Association stated at the public inquiry that the stocks of indigenous pickers with the jute mills amount to 681 gross which are equal to about 2 1/3 months' requirements. Considering that pickers are liable to deterioration unless special arrangements are made for their storage and that pickers of good quality are made in India, the anxiety of some of the jute mills

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to stock themselves with imported pickers for such a long period as 2 to 5 years is not understood. The West Bengal Government, in their letter No. 5141-Com. dated 12th Nov. 1949 to the Ministry of Industry and Supply, Government of India, have stated "The quality of Indian pickers is not so bad as to be unusable by the same jute mills which used them in large quantities during the war period when imported pickers were not available. The average life of Indian pickers varied between 400 to 600 hours and, having regard to the comparative cost, the jute mills could not reasonably refuse to make larger use of these pickers". We feel that this nascent industry should not be allowed to die for want of co-operation from the jute mills. Although import control is maintained primarily on balance of payments grounds and is not intended to serve as a form of protection, we consider that it would not be consistent, either with the balance of payments position of the country or with the wider national interest, to afford any facilities to the jute mill industry to add to its already heavy stocks of imported pickers. We note that no licences are to be issued for imports of jute pickers, and imports of other pickers by established importers are to be allowed to the extent of only 33 1/3 per cent. of their basic imports and those by new comers on an *ad hoc* basis, during the period from January to June 1951. The manufacturers, however, have represented that it takes as long as 9 months to produce good quality pickers, since pickers have to be steeped in oil for about six months and have to be dried thereafter for a further period of 3 to 6 months depending on climatic conditions, (*vide* paragraph 3.3 of the Standard specifications for pickers) and that, unless there is some assurance about the continuance of the present import policy for a sufficiently long period, it would be impossible for the industry to resume the production of jute pickers or to plan the production of cotton pickers. We see considerable force in this contention and recommend that it should be examined whether, within the existing

scheme of import control, an indication could be given to all concerned regarding the import control policy with regard to pickers for at least a year ahead, so as to enable the industry to plan its production. We trust that the Board's findings in regard to domestic requirements, the capacity of the indigenous industry and its actual production will be duly taken into account in determining the quantum of imports.

(b) *Facilities for import of Batavian hides:* Some of the manufacturers import Batavian hides to meet the demand from some mills for some special types of pickers. Batavian hides are at present on an O.G.L. We recommend that the industry may be allowed to import small quantities of Batavian hides which it requires for the manufacture of certain special varieties of pickers. We believe that the recent rise in the prices of such hides will automatically restrict their imports and that there is consequently no danger of the use of indigenous hides being adversely affected by the imports of foreign hides.

(c) *Abolition of the duty on sperm oil:* The manufacturers have asked for the abolition of the import duty of 30 per cent. *ad valorem* at present levied on sperm oil. Since the cost of sperm oil constitutes only 1.1 per cent. of the cost of production of pickers, we think that the industry should be able to bear the burden of this duty.

(d) *Manufacture of glue as a by-product:* In order to reduce the cost of production of pickers, the Board had recommended in paragraph 9 of its previous Report that the possibility of manufacturing glue from hide cuttings should be explored. The All India Pickers Manufacturers' Association has informed us that in accordance with this recommendation, several of its members have installed glue manufacturing plants. The replies received from individual manufacturers, however, do not show that enough progress has been made in this direction. The majority of the manufacturers have yet no arrangements for

utilising their waste cuttings. Some of the manufacturers are manufacturing glue by crude methods and only one of the units, namely, Jay Hind Leather Works has definitely stated that it has installed a refrigerating unit for this purpose. The New India Picker Works, Ahmedabad, have explained that a sister concern, namely, Glue Products Ltd., Cambay, is manufacturing glue out of their hide cuttings, while Pickers Ltd., have stated that, they propose to undertake the manufacture of glue within a year or two. The demand for glue has considerably increased of late, and we recommend that those of the manufacturers who have not yet started the manufacture of this important by-product should take early steps to do so.

(e) *Transport facilities:* In paragraph 24(c) of its previous Report, the Board had recommended that the question of providing quick transport facilities required by the Pickers industry should be favourably considered. We understand that, in accordance with this recommendation, the Government of India, in the Ministry of Transport, has asked the Regional Controllers of Railway Priorities to give all possible assistance to this industry in regard to the movement of raw materials and its finished products. We understand that it is the policy of the Railway Board to give special consideration to requests for quick transport in the case of any commodity which is liable to deterioration. The All India Picker Manufacturers' Association, however, in their memorandum to the Board, have stated that the transport arrangements for raw hides from Bareilly to Ahmedabad and for the finished product from Ahmedabad to certain up-country centres are still not satisfactory. Transport of salted raw hides from Bareilly to Ahmedabad takes three to four weeks and such hides often arrive in a seriously deteriorated condition. Booking for pickers to be despatched to mills in Indore and Calcutta are frequently closed for indefinite periods. In view of the assurance given by the Ministry of Transport, however, we have no doubt that if the Association would bring to the notice

of the authorities specific instances in which transport difficulties are being experienced, such instances would be looked into and that further steps would be taken to improve the situation.

15. Our conclusions and recommendations may be summarised as under:-
Summary of conclusions and recommendations.

(1) The number of units engaged in the manufacture of pickers at the time of the last inquiry was about 60 and the total rated capacity of these units was 50,000 gross per annum. This number has now increased to 70. Many of these units, however, are small and no reliable information is available in regard to their capacity. Of the 13 units for which information is available, the total annual capacity of the 10 units which produce all types of pickers is 38,780 gross and that of the 3 units which produce only jute pickers, about 2,000 gross, making a total of about 40,780 gross. [Paragraph 3 (a)]

(2) The total capacity of the five units which are equipped with power presses is 22,800 gross. Considerable new investment has taken place in the industry and the leading manufacturers are fully conscious of the importance of improving their plant and processes of manufacture. [Paragraph 3 (b)]

(3) The small units should be encouraged to re-organise themselves so as to be able to adopt improved processes of manufacture and the State Governments should be requested to give them the necessary assistance for the purpose. [Paragraph 3 (c)]

(4) The total domestic demand for pickers is estimated at 42,000 gross per annum, made up of 37,750 gross of cotton pickers, 3,500 gross of jute pickers and 750 gross of other pickers. (Paragraph 4).

(5) The total production of pickers of all kinds in sixteen units, for which figures are available, was 16,632

gross in 1948, 11,369 gross in 1949 and 10,349 gross in 1950. Production of 4-B round foot pickers only in these units during the three years was 13,269 gross, 8,292 gross and 7,276 gross respectively. Most of the factories were forced to stop the production of jute pickers in 1948, and have not been able to resume it, owing to their inability to sell their products to the jute mills in Calcutta (Paragraph 5).

(6) With proper care in the selection of hides, the factories should be able to secure most of their requirements of hides internally without any difficulty.

[Paragraph 6 (b)]

(7) (i) The manufacturers should make more efficient arrangements for the selection of their raw materials; (ii) the State Governments should be requested to arrange for the proper grading of hides and (iii) the All-India Picker Manufacturers' Association should take steps to prevent the production of sub-standard pickers by any of its members.

[Paragraph 5 (b)]

(8) Since the grant of protection, the quality of pickers produced by some of the manufacturers has shown a marked improvement. The indigenous industry can be said to have attained the technical efficiency required for manufacturing pickers of satisfactory quality, but most of the manufacturers are not yet able to maintain a uniform standard of quality.

[Paragraph 7 (a) & (b)]

(9) The lack of uniformity which is the principal defect of all varieties of indigenous pickers can be remedied only by an effective enforcement of standards. Adequate arrangements should be made, in consultation with the industry, to ensure that the standard specifications being formulated by the Indian Standards Institution are strictly adhered to. The All-India Picker Manufacturers' Association stated at the public inquiry that if a Government Inspectorate were established for the proper implementation of the standards, the manufacturers would be prepared

to bear a part of the expenditure involved.

[Paragraph 7(c)]

(10) The manufacturers should take note of the defects pointed out by consumers and take concerted steps to remove them.

[Paragraph 7(c)]

(11) The Textile Commissioner has suggested that a list should be prepared of factories which are well equipped and are capable of producing pickers in accordance with the I.S.I. standards and that such factories should be given all facilities to augment their production. This suggestion should be put into effect as early as practicable.

[Paragraph 7(c)]

(12) The Collectors of Customs and the Director-General of Commercial Intelligence and Statistics should be requested to maintain separate statistics by weight and numbers, as well as by value, for imports of pickers used in (a) the cotton mill industry (b) the jute mill industry and (c) other textile industries.

(Paragraph 8).

(13) The fair selling price of 4-B round foot pickers for 1951-52 is estimated at Rs. 155/- per gross and that of jute pickers at Rs. 350/- per gross.

(Paragraph 11).

(14) The c.i.f. prices per gross of imported pickers adopted for the purpose of comparison with the fair selling prices of indigenous pickers are Rs. 192-8-6 and Rs. 431-2-0 for cotton and jute pickers respectively.

(Paragraph 12).

(15) The fair selling prices of indigenous pickers are lower than the landed costs of imported pickers; nevertheless, having regard to the existence of a strong prejudice against the indigenous product, and in order to encourage further investment in the industry, it is recommended that the existing protective duty of 10 per cent. *ad valorem*, which is due to expire on 31st March 1951, should be continued for a further period of 2 years.

(Paragraph 13).

(16) The total stocks of imported pickers with the Indian jute mills, as at 7th December, 1950, amounted to 4,737 gross which were equal to 16½ months' requirements of the entire jute mills industry. Certain mills, comprising 33 per cent. of the total loomage, were carrying stocks which would suffice for over 2 years, others having 36 per cent. of the loomage, from 6 months to 2 years, and still others with 23 per cent. of the loomage, for less than six months. The remaining mills with 8 per cent. of the loomage had no stocks of imported pickers.

[Paragraph 14(a)]

(17) It should be examined whether, within the existing scheme of import control, an indication could be given to all concerned regarding the import control policy with regard to pickers for atleast a year ahead, so as to enable the industry to plan its production.

[Paragraph 14(a)]

(18) The industry may be allowed to import small quantities of Batavian hides which it requires for the manufacture of certain special varieties of pickers.

[Paragraph 14(b)]

(19) The picker manufacturers who have not yet started the manufacture of glue out of waste hide cuttings should take early steps to do so.

[Paragraph 14(d)]

16. We wish to acknowledge the assistance we have received in conducting this inquiry from
 Acknowledgements. Mr. S. Raja, Superintendent, Government Tanning Institute, Bombay and Mr. N. Krishnan, Cost Accounts Officer attached to the Board.

B.V. NARAYANASWAMY,

Member.

M.A. MULKY,

Secretary.

B.N. ADARKAR,

Member.

Bombay,

Dated 30th January, 1951.

APPENDIX I

(vide paragraph 2a)

*List of persons to whom Board's Questionnaires
were issued and from whom replies were received.*

*Those who have replied to the Board's questionnaire.

PRODUCERS *

AHMEDABAD

1. Ahmedabad Chrome Tanning Company,
Outside Jamalpur Gate,
Ahmedabad.
2. Ahmedabad Pickers Works,
New Vadaaj, Sorabji Mistry's Place,
Ahmedabad.
- *3. A.K. Parmar & Company,
Narotam Building, Kapasia Bazar,
Ahmedabad.
4. Arun Industries Ltd.,
Khokhra Mohamedabad,
Ahmedabad.
5. Bharat Pickers Works,
Amraiwadi road,
Ahmedabad.
6. Chimanlal Amichand & Company,
Khas Bazar,
Ahmedabad.
- *7. Chandabhai Bros. & Company,
Post Box No. 34,
Ahmedabad.
8. Chhagan Arjan Pickers Workshop,
Near Memon Suleman Usman Pickers Workshop,
Amraiwadi, Ahmedabad.
9. Darbar Pickers Works,
C/o Mr. Rathod Rumsing Rajabhai,
New Vadaaj, Sorabji Mistry's Place,
Ahmedabad.
10. D. Mangaldas & Company,
Darapur Hatas Chora,
Ahmedabad.

PRODUCERS: (Contd.)

11. Gujerat Pickers Works,
Outside Gomatipur Gate,
Behind Topi Mills' Muse's Gali,
Ahmedabad.
12. C.H. Parmar Pickers Works,
New VadaJ, Post Sabarmati,
Ahmedabad.
13. Gujerat Textile Products,
1685, Near Dinkwa Chowky,
Ahmedabad.
- *14. Graduate Picker Works,
P.B. No. 91, Dabgarwad,
Ahmedabad.
- *15. Hides and Leather Products Ltd.,
Reid Road, Shorkotda Chowky,
Ahmedabad.
16. Hathila & Company,
Ghookanta Road,
Ahmedabad.
- *17. H. Mansuri & Sons,
P.O. Box 84, Khodi Amli,
Ahmedabad.
18. India Pickers Manufacturing Company,
Jamalpur Road, Khandai Sheri,
Ahmedabad.
19. Imperial Trades and Industries,
Raipur, Makariwad Bari,
Ahmedabad.
- *20. Jay Hind Leather Industries Ltd.,
Reid Road, Railwaypura P.O.,
Ahmedabad.
21. Makwana Pickers Works,
Outside Gomatipur Gate,
Ahmedabad.
22. Mohanlal Prabhudas & Co.,
Reid Road,
Ahmedabad.
- *23. Mansuri Picker Works,
P.B. No. 92, Khodi Amli,
Ahmedabad.
24. Modern Picker Supplies,
Post Box No. 96,
Ahmedabad.

PRODUCERS: (Contd.)

- *25. Patel & Parmar Picker Works,
Sorabji Mistry's Place,
Post Sabarmati Road,
Ahmedabad.
- *26. Pickers Limited,
Ellis Bridge,
Ahmedabad.
- 27. P.V. Parmar Picker Works,
Outside Gomatipur Gate, Mussis Chowki,
Ahmedabad.

BOMBAY

- 28. Bharat Picker Works,
Dharavi, Bombay.
- 29. Bombay Picker Works,
Dharavi, Bombay 17.
- 30. G. Badat Rahimtolla & Company,
1st floor, Sir Vithaldas Chambers,
Apollo Street, Bombay.
- 31. Golden Pickers Manufacturing Co.,
125, Jakaria Masjid Street,
Bombay.
- 32. Hasambhai Pradhan,
148, Dabu Street,
Bombay 3.
- 33. Indian Pickers Manufacturing Co.,
Kala Kila, Dharavi Road,
Bombay.
- *34. Viram & Co.,
Jain Temple,
Malad, Bombay.
- 35. K.R. Lakhani,
77, Meadows Street, Fort,
Bombay.
- 36. Modern Pickers Works,
Sir Vithaldas Chambers,
Apollo Street,
Bombay.
- 37. Mohain Picker Works,
132 Surti Moholla, 2 Tanks,
Bombay.
- 38. Noble Pickers Manufacturing Co.,
Kutewadi, Dharavi,
Bombay.

PRODUCERS: (Contd.)

39. National Leather Industries,
105 Sir Vithaldas Chambers,
Apollo Street, Fort, Bombay.
40. Original Hindustan Picker Works,
Dharavi, Bombay 17.
41. Textile Supplies Syndicate (India) Ltd.,
Kamani Bldg.; Sir P.M. Road,
Bombay.
42. Textile Leather Works, Ltd.,
Lalgiri Chambers, Tamarind Lane, Fort,
Bombay.
43. Textile Picker Works (Regd.),
7, Dean Lane, Fort, Bombay.
44. Universal Tanneries Ltd.,
Dharavi, Bombay 17.
45. United Picker Manufacturing Co.,
141, Sayee Bhuvan, Lohar Street,
Bombay.
46. Western India Tanneries Limited,
Dharavi, Bombay.

KATHIAWAR

47. Gulamhusen Chhagan,
Thangadh.
48. Jivanbhai Nagabhai,
Makwata, Raipur.
49. Mulji Kanji,
Thangadh.
- *50. Mukund N. Mashruwalla,
1286, Kalupur,
Ahmedabad.
51. Parmar Pickers Works,
Chuda.
52. Ramniklal Pickers Works,
Joravernagari (Wadhwan State).
S.S. Railway.
53. Sun Pickers and Industrial Works,
Thangadh.
54. Vinod Kasha Picker Works,
Thangadh.
55. Vyas Brothers,
Thangadh.

PRODUCERS: (Contd.)

OTHER PLACES

- *56. Cottage Tanning Institute,
15, College Square,
Calcutta.
- 57. Hatib & Company,
Station Road,
Godhra.
- 58. Hindustan Pickers Manufacturing Co. Ltd.,
Dhanesna Road, Kalol,
(North Gujerat).
- *59. National Chamois Works (1949) Ltd.,
6, Mangoe Lane,
Calcutta.
- 60. Shafi Brothers & Company,
5-A, Gopal Chandra Road,
Calcutta.
- 61. Indusco & Co.,
Fort, Bombay.
- *62. New India Picker Works,
Outside Jamal Gate,
Ahmedabad.
- *63. Swastik Industries,
P.O. Maninagar,
Ahmedabad.
- 64. J. Mansuri & Son,
Ahmedabad.
- 65. S.A. Parmer & Co.,
Ahmedabad.
- *66. The Hindustan Tannery Co.,
Windsor House, P-14, Bentinck Street,
Calcutta.
- *67. Nazir & Co.,
10-C, Bolai Dutt Street,
Calcutta.
- *68. S.K. Guha & Co.,
14, Bechulal Road,
Entally, Calcutta.
- *69. Textile Leather Manufacturing Co.,
60/2, Dharamtala Street,
Calcutta 13.
- 70. National Tannery Co., Ltd.,
Calcutta.
- *71. All India Picker Manufacturers' Association,
Ellis Bridge, Ahmedabad.

CONSUMERS:

- *1. Ahmedabad Mfg. & Calico Printing Co. Ltd.,
P.O. Box No. 12,
Ahmedabad.
- *2. Arvind Mills Ltd.,
Naroda Road,
Ahmedabad.
- *3. Ahmedabad Advance Mills Ltd.,
Bombay House, Bruce Street,
Bombay.
- *4. Buckingham & Carnatic Co. Ltd.,
P.O. Box 66,
Madras.
- *5. Central India Spg. Wvg. & Mfg. Co. Ltd.,
Bombay House, Bruce Street,
Bombay.
- *6. Delhi Cloth & General Mills Co. Ltd.,
Najafgarh Road,
Delhi.
- *7. India United Mills Ltd.,
Indu House, Dougall Road,
Ballard Estate,
Bombay.
- 8. Manhar Mills Ltd.,
Framji Petit Mills Premises,
Reay Road, Bombay 10.
- *9. The Swadeshi Cotton Mills Co. Ltd.,
P.O. Box 19,
Kanpur.
- *10. The Swadeshi Mills, Co. Ltd.,
Bombay House, Bruce Street,
Bombay.
- *11. Tata Industries Ltd.,
Bombay House, Bruce Street,
Bombay.
- *12. Tata Mills Ltd.,
Dadar Road, Parel,
Bombay.
- 13. Western India Spg. & Wvg. Co. Ltd.,
Chinchpockly, Kalachowki,
Bombay.
- *14. W.H. Brady & Co. Ltd.,
Royal Insurance Building,
Churchgate Street,
Bombay.

CONSUMERS: (Contd.)

- *15. Sawnpore Textile Ltd.,
Cooperganj,
Kanpur.
- 16. Dayalbagh Textile Mills Ltd.,
Dayalbagh,
Agra.
- *17. Elgin Mills Co. Ltd.,
P.O. Box No. 11,
Kanpur.
- *18. Juggilal Kamlapat Cotton Spg. & Wvg.
Mills Co. Ltd.,
Amarganj, Kanpur.
- 19. Moradabad Spg. & Wvg. Mills Co. Ltd.,
Moradabad.
- *20. The Muir Mills Co. Ltd.,
Agnes Shan Road,
Kanpur.

ASSOCIATIONS:

- *1. The Ahmedabad Millowners' Association,
Lal Darwaja,
P.O. Box No. 7,
Ahmedabad.
- *2. Millowners' Association,
Elphinstone Building,
Churchgate Street,
Bombay.
- *3. Madhya Pradesh Millowners' Association,
Dhanwatay Chambers,
Gita Grounds, Sitabuldi,
Nagpur.
- 4. South India Millowners' Association,
Coimbatore.
- *5. Bengal Millowners' Association,
2, Church Lane,
Calcutta.
- *6. Indian Jute Mills Association,
Royal Exchange,
P.B. No. 280,
Calcutta.

IMPORTERS:

- 1. Balmer Lawrie & Co. Ltd.,
103 Clive Street,
Calcutta.

IMPORTERS: (Contd.)

2. Bird and Company,
14 Chartered Bank Building,
P.B. No. 46,
Calcutta.
- *3. B.N. Modi and Company,
14/35, Civil Lines,
Kanpur.
4. Consolidated Mills Supplies Ltd.,
Co-operative Insurance Building,
Sir P.M. Road,
Bombay.
- *5. Gannon Dunkerley & Co. Ltd.,
Chartered Bank Building,
Fort, Bombay.
6. J. Bracewell Ltd.,
103, Clive Street,
Calcutta.
- *7. McGregor & Balfour Ltd.,
18, Netaji Subhas Road,
Calcutta.
8. McGavin & Company,
30, Strand Road,
Calcutta.
- *9. Nowrosjee Wadia & Sons Ltd.,
Neville House, Ballard Estate,
Bombay.
10. Ormerods (India) Ltd.,
Bank of Baroda Building,
Apollo Street, Fort,
Bombay.
- *11. Roberts McLean & Co. Ltd.,
31, Netaji Subhas Road,
Calcutta.
12. Simpson & Munro Ltd.,
4, Lyons Range,
Calcutta.
- *13. The Sizing Materials Co. Ltd.,
Jeroo Building,
137, Mahatma Gandhi Road,
Bombay.
- *14. Textile and General Supplies Ltd.,
2nd Floor, Savoy Chambers,
Wallace Street, Fort,
Bombay.
- *15. Buffalo Picker Manufacturers Association
in the U.K., Manchester through the
Leather Belting & Industrial Leather
Association (Fowler & Co).,
7, Hastings Street, Calcutta.

APPENDIX II
[vide paragraph 2 (d)]

*List of persons who attended the inquiry held on
15th January, 1951 in Bombay.*

PRODUCERS:

- | | | |
|--|-----------------|---|
| 1. Mr. D.C. Karaka
Mr. I.M. Mansuri | } 'Representing | The All India Picker
Manufacturers' Associa-
tion, Ellis Bridge,
Ahmedabad. |
| 2. Mr. D.C. Karaka
Mr. James W. Scott | } " | Pickers Ltd., Ellis
Bridge, Ahmedabad. |
| 3. Mr. Chandabhai | " | Chandabhai Bros. & Co.,
Post Box No. 34,
Ahmedabad. |
| 4. Mr. C.N. Patel | " | Hides & Leather Products
Ltd.,
Reid Road, Sherkotda
Chowkey, Ahmedabad. |
| 5. Mr. C.M. Pothiwala | " | Jai Hind Leather Industries
Ltd.,
Reid Road, Railwaypura P.O.,
Ahmedabad. |
| 6. Mr. K.N. Mehta | " | Patel & Parmar Picker Works,
Sorabji Mistry's Place,
Post Sabarmati Road,
Ahmedabad. |
| 7. Mr. A.S. Authan | " | National Leather Industries,
105, Sir Vithaldas Chambers,
Apollo Street, Fort, Bombay. |
| 8. Mr. Mukund N.
Mashruwalla | " | Mukund N. Mashruwalla,
1286, Kalupure,
Ahmedabad. |
| 9. Mr. B.C. Majumdar | " | National Chamois Works (1949)
Ltd.,
6, Mangoe Lane, Calcutta. |
| 10. Mr. R.T. Desai
Mr. P.L. Bhatt | " | Swastik Industries,
P.O. Maninagar,
Ahmedabad. |

IMPORTERS:

- | | | |
|-------------------------------|--------------|--|
| 1. Mr. J.A. Hilder | Representing | Gannon Dunkerley & Co. Ltd.,
Chartered Bank Building,
Fort, Bombay. |
| 2. Mr. N. Jamshedji
Ruwala | " | Nowrosjee Wadia & Sons Ltd.,
Neville House, Graham Road,
Ballard Estate, Bombay. |
| 3. Mr. R.C. Atterton | " | Roberts McLean & Co. Ltd.,
31, Netaji Subhas Road,
Calcutta. |
| 4. Mr. G.R.B. Owen | " | Sizing Materials Co. Ltd.,
Jeroo Building,
137, Mahatma Gandhi Road,
Bombay. |

CONSUMERS:

- | | | |
|---------------------------------------|---|--|
| 1. Mr. Nanddas Haridas | " | The Ahmedabad Millowners'
Association, Lal Darwaja,
P.O. Box No. 7, Ahmedabad. |
| 2. Mr. R.A. Cole
Mr. T.W. Scroggie | } | Indian Jute Mills
Association, Royal Exchange,
P.B.No. 280, Calcutta. |
| 3. Mr. H.R. Batliwala | | |
| 4. Mr. D.B. Sampat | " | India United Mills Ltd.,
Indu House, Dougall Road,
Ballard Estate, Bombay. |

OFFICIALS:

- | | | |
|---------------------|---|--|
| 1. Mr. S. Raja | " | { 1. Director of Industries,
Govt. of Bombay,
Bombay.
2. Government Training
Institute, Bandra,
Bombay. |
| 2. Mr. P.R. Chaukar | " | |

APPENDIX III
(Vide paragraph 5)

Statement showing rated capacity, actual production and other particulars of certain pickers factories

Name of the factory and its location.	Date of commencement of production.	Total capital invested by the party.	Total no. of workers employed.	Annual production capacity in gross single shift.	Actual output for the last three years (gross)									
					1948		1949		1950		1951		Total	
					(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)
1. Chandelmal Bros. & Co., Outside Saraspur Gate, Aitol Road, Ahmedabad.	1914	2,70,000	40	5,000	1,700	1,697	1,475	-	-	-	-	-	1,700	1,697
2. Pickers Ltd., Varoda Back Road, Ahmedabad.	1911	17,00,000	80	9,000	9,179	1,757	1,763	115	79	10	261	100	-	2,555
3. Swastik Industries, Behind Lal Mills, Radcliff Road, Vaninagar, Ahmedabad.	1948	1,00,000	15	2,000	1,707	1,778	848	-	-	-	-	-	1,707	1,778
4. Mansuri Picker Works, Opp. Naroda Rly. Station, Behman Nagar, Varod, (A.P. Rly.).	1914	about 1,00,000	Average 3 per day in 1948.	4,290	-	-	-	-	-	-	-	-	452	467
5. H. Mansuri & Sons, Opp. Naroda Rly. Station, Behman Nagar, Varod, (A.P. Rly.).	1914	about 1,00,000	Average 6 per day in 1949.	1,290	-	-	-	-	-	-	-	-	542	413
6. Graduate Picker Works, Opp. Naroda Rly. Station, Behman Nagar, Varod, (A.P. Rly.).	1914	about 1,00,000	Average 3 per day in 1949.	1,290	-	-	-	-	-	-	-	-	478	407
7. Jay Himi Leather Industries, Kalyanspura, Talol, Ahmedabad.	-	-	-	3,000	-	-	-	-	-	-	-	-	625	1,382
													(10 months)	(10 months)

(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)
8. Patel & Parmar Pickers Limited, Sorsabji Mistry Place, Post Sabarmati, Ahmedabad.	--	--	--	1,200	644	570	735	70	52	8	2	--	--	316	522	743
9. Hides & Leather Products Limited, Reid Road, Rly. Pura P.O., Ahmedabad.	--	--	--	4,600	1,234	780	1,375	--	--	--	21	--	--	1,255	760	1,375 (Up to Sept.)
10. New India Pickers Works, Outside Jamalpur Gate, Ahmedabad.	--	--	--	--	915	1,410	1,080	13	31	--	--	--	--	928	1,441	1,080 (Up to Sept.)
11. A.K. Parmar & Co., Kapsia Bazar, Narotam Bldg., Ahmedabad.	--	--	--	--	--	--	--	--	--	--	--	--	--	54	28	11
12. Viram & Co., Jain Temple, Mglad, Bombay.	--	--	--	--	--	--	--	--	--	--	--	--	--	90	110	128
13. National Leather Industries, Dharavi, Bombay.	--	--	--	1,200	1,000*	700*	--	--	--	--	--	--	--	1,000	700	--
14. Mahand N. Mashruwala, 1296 Raja Mehta, Kalupur, Ahmedabad.	--	--	--	600 (Jute)	--	--	--	--	--	--	--	--	--	457	110	--
15. National Chamolis Works, 1940 (1940) Ltd., 33/1, North Topsia Road, P.O. Tiljala, Calcutta.	--	1,00,000	300	900 (Jute)	--	--	--	--	--	--	200	--	--	200	--	--
16. S.K. Guha & Company, 14, Bechulal Road, Pitally, Calcutta.	1950	25,000	50	500 (Jute)	--	--	--	--	--	--	--	--	--	--	--	--
				40,780	13,269	8,292	7,276	198	122	48	487	100	--	16,692	11,369	10,349**

* Figures for 1948-49 and 1949-50.

** This total is only approximate since some of the producers have not furnished data for the complete year, 1950.

APPENDIX IV
(Vide paragraph 12)

Statement showing the selling prices and landed costs of imported pickers with break-down into C. i. f., Customs Duty and Clearing Charges

Name of Importer	Origin of Imports	Date of Imports	Type & Specification	Quantity Imported	C.I.F. gross	Customs duty	Clearing charges	Landed cost per gross	Selling price per gross	REMARKS
1	2	3	4	5	6	7	8	9	10	11
					Rs.			Rs.		Rs.
					(a) Cotton Pickers.					
1. Roberts McLean & Co. Ltd., Calcutta. U.K.		26-8-1949	Cotton Pickers	11,400 nos	130-12-0	10 ⁰⁰	2 1/2	178-11-6	195-0-0	
2. The Sizing Materials Co. Ltd., Bombay. U.K.		--	48, round foot-Batavian Raw Hide.	--	107 1/2	6-0	19-12-0	2-0-0	218-8-0	240-0-0
							10 ⁰⁰			
3. Novrosjee Wadia & Sons, Ltd., Bombay. U.K.		Invoice dated 14-3-50	48 Pickers	57 gross	197-0-0	10 ⁰⁰	--	216-11-0	228-1-0	
		15-5-1950	Drop Box No. 24	10 "	440-12-0	10 ⁰⁰	--	484-13-0	513-9-0	
4. Cannon Dunkerley & Co. Ltd., Bombay. U.K.		19-8-1949	48 Batavian Raw Hides	46 "	156-7-0	15-13-6	3-2-8	177-7-2		
			76 78 lbs. per double gross. Batavian Raw Hides							
		19-8-1949		10 "	170-1-6	17-0-2	3-6-5	190-8-1		
		20-6-1950	Drop Box No. 88	2 "	224-6-3	22-7-0	4-7-10	251-5-1		
5. Textile & General Supplies Ltd., Bombay. U.K.		14-4-1950	48 weighing 88 lbs. per double gross.	82 "	190-6-0	10 ⁰⁰	1 1/2	214-10-0	228-0-0	
6. Collector of Customs, Bombay. U.K.		June 1950	Pickers Dig-Dag Brand 48-78	--	192-8-6					
		-10-	-10-	--	per gross. 170-8-8					

This price is based on advice from the firms principals dated 4.10.50. Imports Licence is awaited.

The Collector of Customs, Bombay has stated that no imports of pickers, jute, woollen & silk pickers are noticed at his port.

1	2	3	4	5	6	7	8	9	10	11
6. Collector of Customs, U.K. Bombay. (contd.)	Sept. 1950	Picker Brand not known.	--	180- 0-7*						
U.K.	Aug. 1950	-do-	--	200- 3-10*						
Netherlands	-do-	-do-	--	179- 3-9 *						
Japan	25-10-1950	-do-	--	179- 7-2						
July 1950	-do-	-do-	--	191-10-8 *						
7. Collector of Customs, Madras.	Dec. 1950	D.B.	--	380- 0-0						
(b) Jute Pickers										
1. Roberts McLean & Co. Ltd., Calcutta.	12-7-1949	Jute Pickers.	4,000 pcs.	367- 5-0	10%	2 1/2	417- 3-0	510-0-0		
2. McGregor & Balfour, Calcutta.	June, 1950	for 2" spin- dles 'Invinci- ble Brand' Jute.	8,000 "	431- 2-0	10%	23-12-0	198- 3-0	528-0-0		
3. Collector of Customs, U.K. Calcutta.	--	Jute	--	(a) Rs. 1.6/- to Rs. 5/- per lb. (b) Rs. 4.10/- per lb.						49
(c) Other kinds.										
1. Gannon Dunkerley & Co. Ltd., Bombay.	20-6-1950	3 slot double drip pickers	3 gross	400- 3-7	40-0-4	9-12-10	519-0-5			
U.K.	1-12-1949	No. 38. Moon Brand under prick No. 29.	2 "	265-9-6	26-9-11	5- 5- 0	237- 7-5			
U.K.	-do-	-do- No. 62.	2 "	197- 5-6	19- 8-7	3-14- 6	218-12-7			
U.K.	24-5-1950	Old tanned leather picker No. 24.	2 "	666-11-6	68-10-3	13-11-3	762- 2-0			

* Conversion ratio:
40 lbs. = 1 gross.

Collector of Customs,
Calcutta has stated
that no imports of
cotton, silk and
woollen pickers are
noticed at his port.

	Symbol	No.
31. Fire hose (1947)	PTB	120
32. Steel belt lacing (1947)	PTB	119
33. Ferro-silicon (1947)	PTB	116
34. Stearic acid and Oleic acid (1947).	PTB	117
35. Machine tools (1947)	PTB	114
36. Wire healds (1946)	PTB	123
37. Pickers (1948)	PTB	125
38. Motor vehicle batteries (1948)	PTB	122
39. Hydraulic brake fluid (1948)	PTB	120
40. Bobbins (1948)	PTB	128
41. Slate and slate pencils (1949)	PTB	138
42. Expanded metals (1949)	PTB	150
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(If the above reports are available with the Manager of Publications, Civil Lines, Delhi, and the Secretary, Indian Tariff Board, Contractor Building, Ballard Estate, Bombay 1.

